



ROOTED STRATEGY

**5 Year Report
2020-2025**

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**Kathryn
Evans**
she/her
President
& CEO



**Lindsay
Harmon**
she/her
Senior Project
Consultant

Who is Rooted Strategy?

Rooted Strategy partners with organizations and leaders to imagine, design, and build a more just and equitable world.

We specialize in strategic planning, design and implementation, change management, facilitated learning, coaching, and board development.

Our approach prioritizes relationships and trust to establish and maintain long-term strategic change. We meet our clients where they are, create brave spaces, and build capacity for organizations and leaders to achieve their goals.

As we navigate some of the most complex challenges in human history, the world needs leaders who are bold and resilient. When you work with Rooted Strategy, you gain a clear vision for the future of your work, a roadmap to success, and tools for the journey.

Based in Kansas City, MO on the unceded land of the Kaw, Kickapoo, and Osage people.

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Dear friends and colleagues,

It's hard to believe it has been 5 years since the seeds for Rooted Strategy were planted. When I started this company, my only hope was that I would be able to create something that could provide support and encouragement to people who are trying to create more justice, more equity, and more hope in this world. That hope endures, and I am filled with gratitude that I have been able to steward this vision in such a way that we can celebrate it today.

The first five years of business are crucial. These foundational years shape everything that follows—they are both intensely vulnerable and infinitely possible. During this time, we forge our identity, cultivate our culture, and build resilience through trial and error, establishing patterns that often become the very DNA of our organization.

I can't help but be reminded of the same vulnerability and possibility that children experience in their first 5 years. I learned this first from my late Mother, a brilliant

child development scholar; and again when I became a parent; and again through numerous child-focused projects and initiatives that I have taken on during my time at Rooted Strategy. Just like in a child's life, these early years of Rooted Strategy have been marked by curiosity and stretching into new experiences. Still, we have learned that there's a lot we don't know, and we continue to need the support and encouragement of our colleagues, mentors, and friends.

Everything we have done and will continue to do shapes who we aspire to be. Our motto is: if you want to grow, start at the roots. Our roots, as you will see in this report, are deep in the Kansas City soil. Our roots remind us of who we love, what problems we want to solve, what we value, and what we still need to learn.

With childlike wonder, I look to the future and feel a renewed sense of purpose. Thank you for helping to raise Rooted Strategy, and for your ongoing support.

With gratitude,

Kathryn Evans
President & CEO

Design & Implementation



The fresh perspective of an outside expert can set a nonprofit organization on the right course, whether it's the philanthropic arm of a national medical association or the offshoot of an urban church.

For the American Academy of Family Physicians (AAFP) Foundation, executive director Heather Palmer said having a more diverse board than ever before is one example of how Rooted Strategy helped the Foundation strengthen its diversity, equity, and inclusion environment.

The Foundation is also doing a better job of capturing the demographic information of its funding applicants due to its work with Rooted Strategy, Palmer said. Thanks to advice from Rooted Strategy, the Foundation has also sharpened the lens for Foundation messaging and storytelling to ensure it captures the diverse perspectives of the people and communities it serves.

But if there's one thing that really sticks in Palmer's mind, it's Evans' focus on gathering data to test assumptions

and benchmark progress. What gets measured gets done, as the old saying goes.

"Something that Rooted Strategy has always taught us as a board and staff is that sometimes we have to slow down a little bit and make sure we get these things right and then learn from what we're seeing," Palmer said.

For Calvary Community Outreach Network (CCON), executive director Rev. Eric Williams said, Rooted Strategy helped organize its various components and initiatives.

Williams is also pastor of Calvary Temple Baptist Church, which established CCON in the early 1990s to respond to the AIDS epidemic. The organization's focus remains on community wellness and youth development.

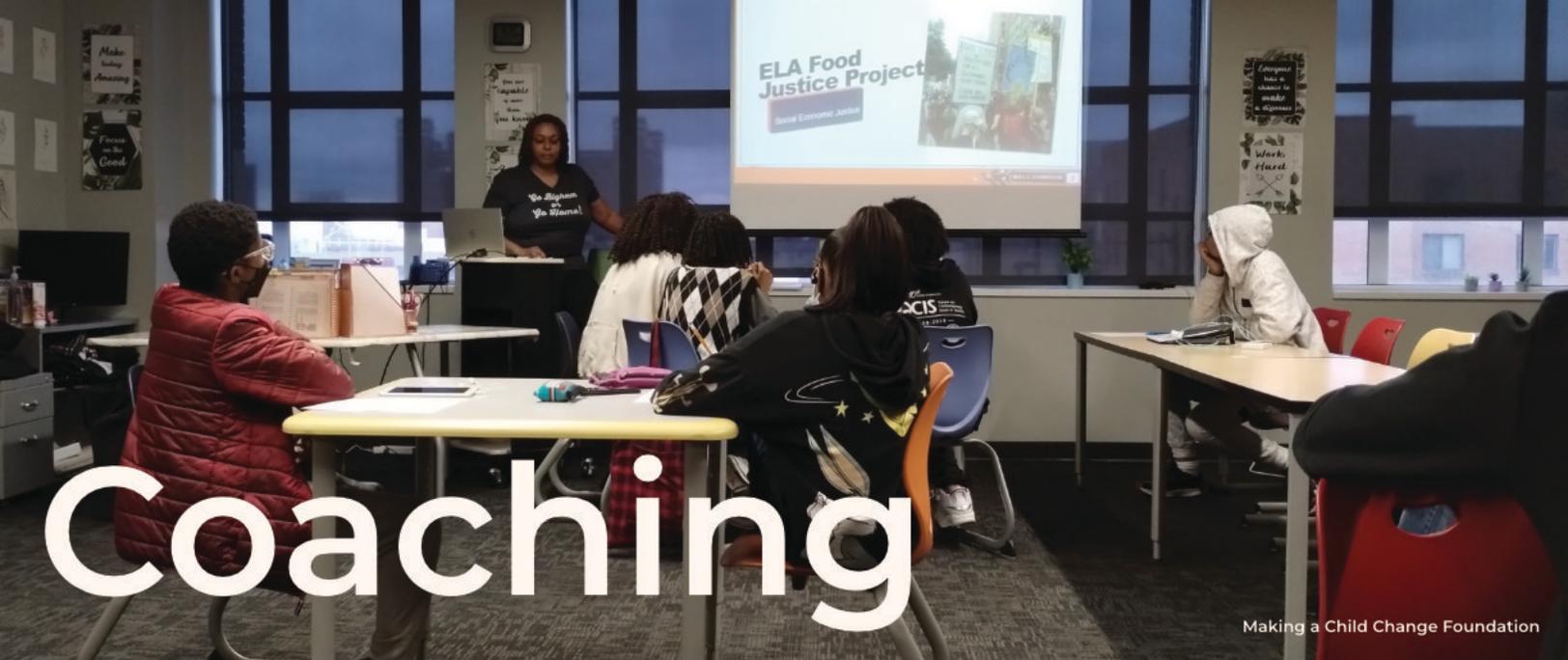
Through the years, Williams said, the board has been "very sensitive to our need to respond to things that emerge," such as COVID-19 or the aftermath of Hurricane Katrina in 2005. CCON also works with other faith groups, such as the Concerned Clergy Coalition and the Metro Organization for Racial and Economic Equity (MORE2).

CCON worked with Rooted Strategy, Williams said, "to focus on things that are important, not only for us and our board, but for this community, so that we're not frazzled and jumping from post to post, but that we tactfully and strategically move forward with some solid plans."

He attributed much of the success to Rooted Strategy, and to Kathryn Evans in particular.

"She understands the Black community, she understands the business community, she understands the nonprofit community, and so none of those entities and none of those behaviors are strange for her," Williams said. "That's quite unusual to find someone with those unique skills."





Coaching

Making a Child Change Foundation

One is a Detroit woman on a mission to teach financial literacy to kids. The other is an Indianapolis man working to make churches accessible to people with disabilities.

The common denominator for the nonprofit leaders, Sophia Barnett and the Rev. Dr. Milton Keys, is their coach Kathryn Evans. She is coaching the pair through the St. Louis-based National Benevolent Association, which named Barnett and Keys its initial impact Fellows.

The fellowship pays fellows a salary so they can work full-time on building their social enterprises: Making a Child Change Foundation (Barnett) and Advocates Embassy Corp. (Keys). Both fellows praised Evans for being both businesslike and personable.

"She is very deliberate, very on-purpose, and intentional about every single thing that she's doing and everything that she's saying," Barnett said. She described Evans as a "business therapist" who established a rapport like talking to a cousin you haven't seen in a while.

To Keys, Evans is a teacher's teacher. "Thank God for Kathryn," he said. "I don't know what I would do without her."

Both fellows noted Evans's ability to break down large goals into small, achievable chunks. They said she is a whiz with spreadsheets and worksheets, sometimes even creating them on the fly during sessions.

One notable example for Barnett was establishing pricing for the financial literacy workshops she provides through MACC Foundation. Evans showed Barnett that she was substantially underpricing the service when accounting for factors like the time it took to develop the workshop.

Evans also created a grid within a document that helped Barnett get a handle on her grant writing. The grid centralized basic information into one document, so Barnett did not have to cut and paste from several places for each application.

"I thought I was organized," Barnett said. "No, she's organization on a whole other level, and I appreciate that."

Similarly, Evans helped Keys set a price for his book, which draws from his experience as a person who has defied the odds by thriving into adulthood after being born with cerebral palsy.



Dr. Milton Keys, Advocates Embassy Corp.

Keys and Evans were also working on a detailed long-term goal sheet as a roadmap for long-term sustainability. In the medium term, he was focusing on a podcast and other platforms to deliver his content.

Working with Evans has supercharged Barnett's ability to accomplish tasks. The same thing goes for Keys.

Absent working with Evans, Keys said, "I don't think I would be as organized. I would not be as clear about my goals."



Facilitated Learning

Children of Incarcerated Parents Director Barbara Courtney (center), with team members Amgad Megally (top) and Daisy Courtney (right).

Led by superstars at every position, fans nicknamed the 1992 U.S. men's Olympic basketball squad the "Dream Team." But with apologies to Michael Jordan and company, Rooted Strategy's facilitated learning remakes nonprofit staff into gold-medal-worthy dream teams in their own right.

Just ask Barbara Courtney, founder and executive director of Children of Incarcerated Parents, which provides services to children and helps families maintain ties until reunification. Upon engaging with Rooted Strategy through REACH Healthcare Foundation's Core Consultants program, her first words to Kathryn Evans and Lindsay Harmon were that she did not feel like she had a team.

commit to decisions and action plans, and maintain individual accountability for achieving collective results.

Courtney said she is more trusting and comfortable with volunteers after working with Rooted Strategy. She has learned to accept that volunteers come with good intentions, but sometimes do not always finish what they started.

Courtney has also secured funding through the grant writing advice provided by Rooted Strategy, and she was thankful for the company's ongoing guidance in helping her develop a life-skills curriculum for children and caregivers. With Evans and Harmon in her corner, Courtney said two steps forward has turned into eight.



Mothers in Charge founder Rosilyn Temple celebrates with their volunteer team

"When you have a good team of support," she said, "and they're able to let you see a different way, then instead of looking straight, you're able to turn your head and look around."

Rosilyn Temple is another founder who strengthened her organization by working with Rooted Strategy. Following the murder of her son in 2011, Temple started Kansas City Mothers In Charge (KC MIC) to provide crisis response and ongoing support for friends and family of homicide victims. Rooted Strategy helped Temple and the managing director sort out their roles. Temple said the two had been colliding at times.

Rooted Strategy, she said, "helped me to see some of the things that I need to step back and let go and allow someone else to do." Working with Rooted Strategy also helped Temple realize the organization needed a bookkeeper and office manager.

"And I remember Kathryn, it was like yesterday, responded, 'We are your team,'" Courtney said. "It opened up more security for me." Rooted Strategy helps teams build trust, have constructive conflict around ideas,

KC MIC is in a good place now, Temple said, "and I see us going in a way where we can do more in the community because we're working together and understand our roles."



Strategic Planning

Start At Zero Team members (from left to right) Rasheedah Villarreal, Wellness Coordinator; Arleen Martinez, Director of Programs; Briana Moore, Family & Community Support Worker; Esmeralda Ramirez, Bilingual Family & Community Support Worker

One way for an early childhood organization to provide gold-standard services is to become a blue ribbon affiliate of Parents as Teachers, a pioneering home-visit program for families of preschoolers.

Earning that stamp of approval from Parents as Teachers was part of the strategic plan that Rooted Strategy developed for Start at Zero (SAZ). The goal became a reality in October 2024.

Located on Troost Avenue, SAZ primarily serves low-income families. SAZ conducted approximately 830 home visits in fiscal year 2024.

Other priorities addressed in the strategic plan were SAZ's parent cafes and its play cafe.

Parents and caregivers lead the parent cafes, a series of conversations designed to build rapport among the adults in the community caring for young children. SAZ encourages participants to become parent leaders in future cafes.

SAZ recently achieved one goal of having a cafe for Spanish speakers.

Martinez said strengthening parent cafes was one idea that emerged from staff in the strategic planning process. The future hope is to establish cafes that meet independently outside of SAZ.

SAZ is also making progress on the play cafe, a space the organization is building out for children from historically marginalized communities. It will also provide respite for parents.

The hope is to have the space finished no later than July, which would coincide with the first anniversary of Amanda Vega-Mavec coming on as executive director.

Vega-Mavec said the strategic plan was helpful in her new role because it "gave me a clear roadmap of where I needed to pick up and continue the work." She also appreciated that the plan's prep work and action items provide short-term steps toward achieving the larger objectives.

Martinez was thankful for Rooted Strategy's inclusive strategic planning process that included staff.

"It made me feel more part of the organization. Being able to have your opinions heard is amazing," she said.

"Yes, it's a job," Martinez continued, "but at the same time, you're part of a dream and part of something that is going to be making the community better. And it's so great to be part of that and be able to express things that you know the community will need."



For Arleen Martinez, SAZ's Director of Programs, earning blue-ribbon status proved the value of Rooted Strategy's assistance on the strategic plan. She said good ideas can fall by the wayside if not organized and written down.

"It's good to have somebody who guides you there," Martinez said, "and [the strategic plan] was amazing for us in the long run."



Change Management

The Linda Hall Library's first major purchase, in 1946, included journals, technical reports, and other materials from the American Academy of Arts and Sciences.

The acquisition laid the foundation for the Linda Hall Library's status as an internationally renowned research institution. But current library officials determined that continued success required emphasizing exhibits, speakers, and other programming for the general public.

"And Rooted Strategy was really pretty critical in us working through all of that and determining what actions we are going to take, how we measure those actions, and how we know if we've accomplished what we said we were going to accomplish," said Chief financial and Operations Officer Brian Gordon. "They helped us answer those questions."

Gordon and President Eric Dorfman, newly hired in 2023, worked with Rooted Strategy's Kathryn Evans and Lindsay Harmon for approximately a year on developing the strategic plan.

Rooted Strategy's work included brainstorming with Gordon and Dorfman along with workshopping ways to communicate with staff, including surveys. As an Army veteran, Gordon likened the process to war-gaming.

Rooted Strategy also met regularly with a strategic planning commission the library established within its ranks, facilitated workshops to gather feedback from staff, and gathered employee comments on a draft of the strategic plan.

Gordon said Evans and Harmon were excellent facilitators and listeners. Rooted Strategy ultimately produced several reports with the information it compiled.

Gordon and Dorfman preferred to handle the process with the board of trustees and to craft the final strategic plan. Gordon understood that was different from Rooted Strategy's other engagements, but he said their flexibility was another indicator of their strength.

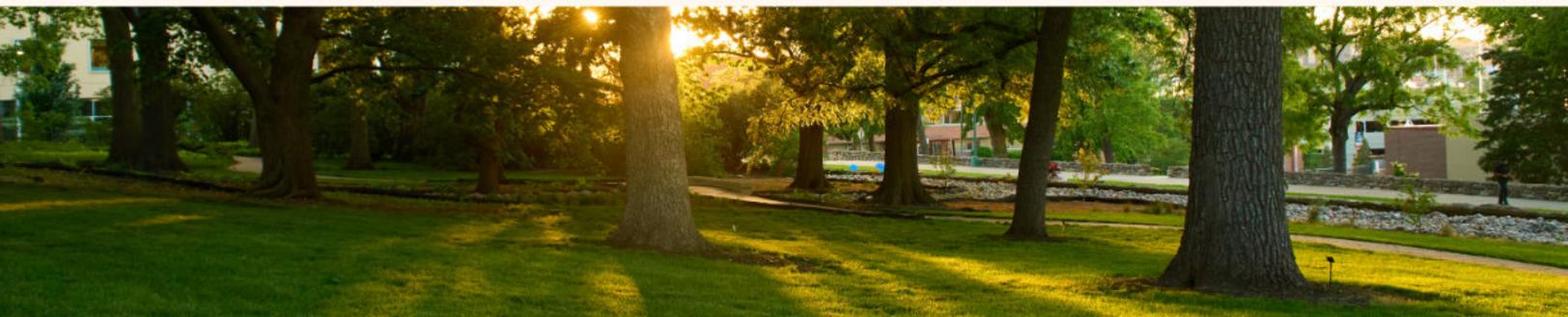
"I guess you could look at it as, if you're building a house, I think we were all members of the building team," Gordon said. "Eric and I were definitely the finishing carpenters."

Outside assistance allowed honest feedback from staff. They would likely have been more cautious in expressing their opinions if they were talking to their bosses, Gordon said.

"We wanted reality," he said, "and they helped us get that."

Gordon is a big fan of the late Bobby Knight, a famed college basketball coach. Knight preached preparedness, and Gordon said that is what Rooted Strategy brought to the table for Linda Hall Library.

"They prepared us to be successful," he said. "That's what I would say they helped us do."





Board Development

Experienced nonprofit volunteers know that board service carries real responsibilities, but the weight of the role can shock neophytes, especially if they blithely take on the role of chairman.

However, even seasoned board chairs can benefit from talking about common problems and workable solutions with their peers, and that's the premise behind Rooted Strategy's "Caring & Chairing" sessions. The company generally hosts the discussions on the fourth Thursday of every other month, from 8 a.m. to 9:30 a.m. at Equal Minded Cafe, 4327 Troost Ave.

The brainchild of Rooted Strategy Senior Project Consultant Lindsay Harmon, who has firsthand experience with board chairmanship, "Caring & Chairing" is an informal discussion that sometimes revolves around a topic presented by a guest speaker.

Upcoming sessions, for instance, are scheduled to feature industry professionals covering the board's role in budgeting and in diversity, equity, and inclusion.

Harmon said improving the effectiveness of meetings is one recurring theme. Board chairs also talk a lot about getting other members to attend meetings and assist with fundraising.

Harmon hopes that attendance will grow as Rooted Strategy continues to promote the sessions.

"But you know," she said, "if we only have three people, then that's three people that we were able to support that month. We really just wanted to create the space for anyone that needed it."

Harmon was fortunate to have David Renz as a mentor when she was a board chair. The director emeritus of the Midwest Center for Nonprofit Leadership at the University of Missouri-Kansas City, Renz has served as a resource at some of the "Caring & Chairing" discussions.

He said it's helpful for board chairs to hear about successes — and failures.

"Sadly, one of the things that is best for our learning is the stuff that doesn't turn out right," Renz said. "So when somebody else can tell you, 'I tried this and it blew up in my face,' then it's kind of like, 'OK, note to self.'"

Renz has also noticed that participants sometimes come up with solutions simply by talking out their problems to the group.

Prior to COVID-19, Renz said there seemed to be a certain predictability or cadence to board service. That's not the case anymore, especially given the recent actions at the federal level, so Renz said "Caring & Sharing" provides a forum for navigating uncharted territory.

"I don't know anybody who thinks, 'I've got a pretty good handle on where this is going and how we'll adapt,'" he said.

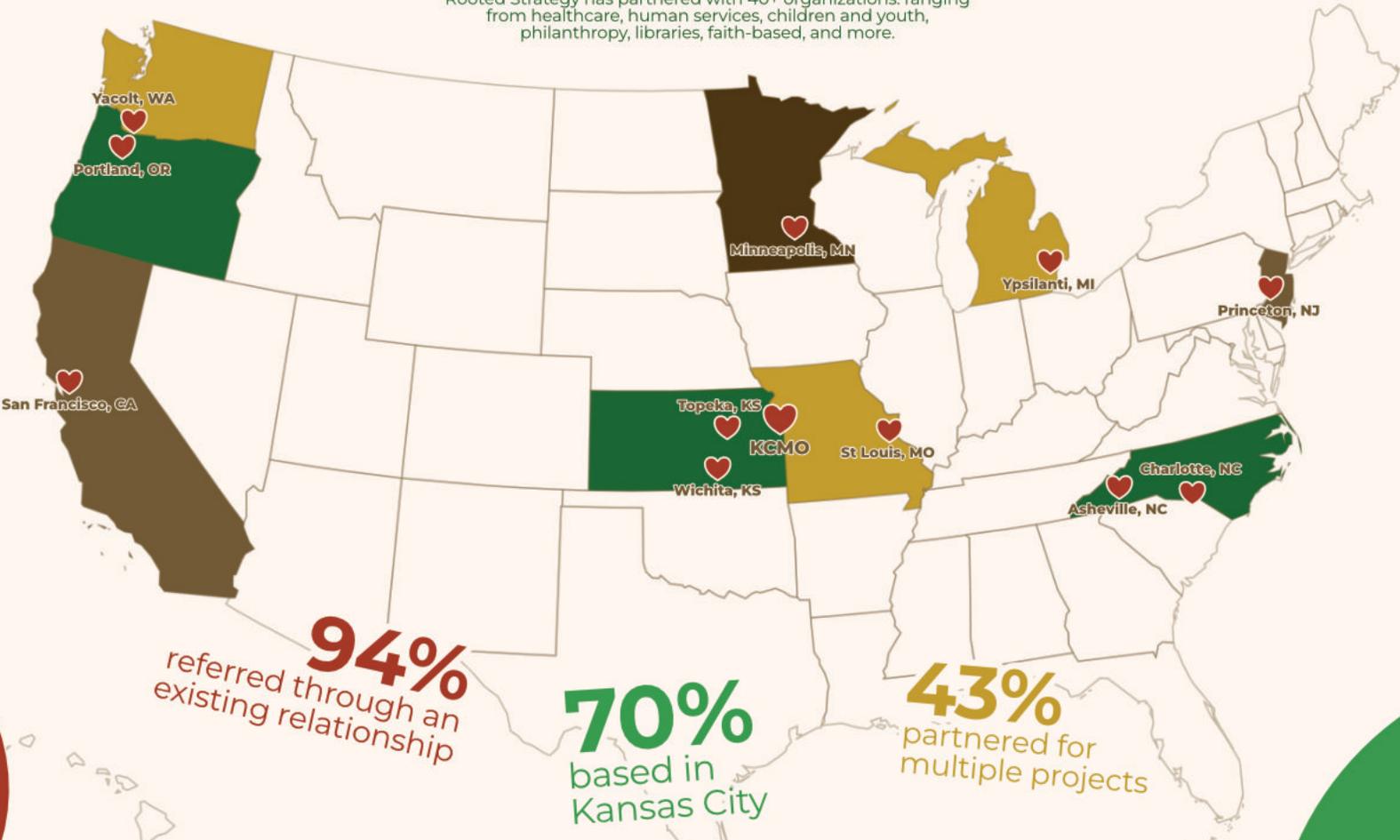
KC Love

From day one, our Kansas City roots have provided the rich soil from which Rooted Strategy has grown. The relationships we've cultivated here are the foundation of our success. Our networks create resilience and possibilities that extend far beyond what we could ever do alone. We treasure that most of our client partnerships are KC-based, allowing us to contribute directly the hometown that we love.



40+ partnerships nationwide

Rooted Strategy has partnered with 40+ organizations, ranging from healthcare, human services, children and youth, philanthropy, libraries, faith-based, and more.



94% referred through an existing relationship

70% based in Kansas City

43% partnered for multiple projects



Amethyst Place



The Arboretum at Linda Hall Library



Manheim Gardens



Equal Minded Cafe



A Servant's Heart (ASH)
 Acterra
 Ad Hoc Group Against Crime
 American Academy of Family Physicians (AAFP) Foundation
 Amethyst Place
 Black Community Fund
 Calvary Community Outreach Network (CCON)
 Camp Encourage
 Children of Incarcerated Parents
 CommCARE
 Community Health Council of Wyandotte County (CHC)
 Community of Christ - Greater Pacific Northwest

Community of Christ - Headquarters
 Community of Christ - Central Missouri USA Mission Center
 CoThinkk
 GreenLight Kansas City
 Indigo Innovation Group
 Johnson County Department of Health and Environment
 Kansas Action for Children
 Kansas Birth Justice Society
 Kansas Black Leadership Council
 Kansas Breastfeeding Coalition
 Kansas City Friends of Alvin Ailey (KCFAA)

Kansas City Hospice & Palliative Care
 Kansas City Public Schools (KCPS) Education Foundation
 KC Health Collaborative (KCHC)
 KC Mothers in Charge
 KC People's Fund
 Lewis River Campground
 Linda Hall Library
 Lyrik's Institution
 Margaret A. Cargill Philanthropies (MACP)
 Margaret Atwood's Practical Utopias
 Missouri Budget Project
 Missouri Foundation for Health

Moran Company
 National Benevolent Association
 Planet Play
 Racial Equity Collaborative
 REACH Healthcare Foundation
 Rockhurst High School
 Robert Wood Johnson Foundation
 Scuola Vita Nuova Charter School
 Serve the World Charities
 The Family Conservancy
 The Village Initiative
 United Community Services of Johnson County

Connect with us!

Check out our resources, sign up for an event, or schedule a call with us! Scan the QR code for more information or visit rootedstrategy.com

